

Docket No. AUS920030293US1

ABSTRACT OF THE DISCLOSURE

METHOD, SYSTEM, AND PRODUCT FOR PROVIDING A GRAPHICAL AND INTERACTIVE FINANCIAL PLANNING TOOL

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A system, method, and product are disclosed in a data processing system for providing a financial planning tool. A two-dimensional coordinate system having time depicted along a first axis and value depicted along a second axis is displayed. The first axis is divided into multiple time periods. A different investment plan is specified for each time period by specifying assumptions and a percentage allocation. Assumptions are specified regarding projected growth and anticipated contribution for each type of investment. A percentage allocation is specified of all investments to be held among each type of investment. An investment graph is generated, utilizing the coordinate system, that depicts a total value of all investments held as well as a change over time of the total value during each time period. The investment graph is graphically depicted utilizing a graphical user interface in order to provide a financial planning tool.

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